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TRAVEL PRINTOUT

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U.S. Travel Endures Recession, Gulf Crisis

The Persian Gulf crisis and recession of 1990 did not prevent travel in the United States from increasing for the sixth consecutive year, according to the Data Center's *1990 Travel Market Report*. Americans took 1.27 billion person-trips last year, a 1 percent increase over 1989. (A person-trip is one person traveling 100 miles or more away from home.)

The United States economy experienced sluggish growth throughout 1990. Real GNP barely grew at 0.9 percent for the year, compared to 3 percent in 1989, and payroll employment inched forward at 1.8 percent.

In the last three months of 1990, the state of the economy had a substantial impact on the volume of travel in the United States.

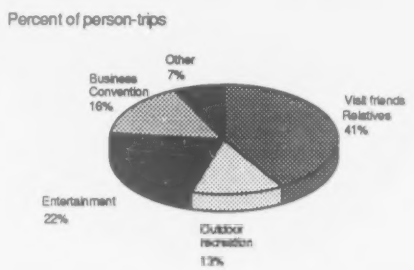
"Even though travel did decline in the last quarter of 1990, the overall volume of travel still showed a 1 percent increase over 1989," said Suzanne Cook, executive director of the Data Center.

The last economic recession in the United States occurred in 1981-82 and had a substantial impact on the travel industry. According to the Data Center's National Travel Survey, the number of person-trips decreased 7 percent in 1982 and did not begin to show an increase until 1985.

The current recession and crisis, however, did affect travelers' transportation habits in 1990. Auto/truck/RV travel rose nearly 3 percent during the year, while air travel fell slightly during 1990. The average duration among auto travelers was equal to 1989, 4 nights, and the average duration among air travelers was slightly longer than a year ago, 6.6 nights.

Auto travelers chose both homes of friends and relatives, 42 percent, and hotels/motels, 40 percent, as their preferred lodging type. Eighty percent of auto trips were for pleasure purposes and 51 percent were taken over a weekend.

PURPOSE OF TRIP, 1990



Source: U.S. Travel Data Center's National Travel Survey

Vacation travel remained stable in 1990, compared to a 6 percent increase in 1989. The duration of vacation travel continued to decline as the average length of stay in 1990 was 4.6 nights. The average round-trip distance also declined, down to 880 miles in 1990 from 940 in 1989.

The Data Center's *Summer Vacation Travel Forecast* indicates that the economy is the overlying factor to the altering of consumer's travel habits, such as shorter duration and distance travel. "Americans still want to travel despite the present economic conditions," said Cook at a news conference in Atlanta. "They will just be changing the way they traveled in the past."

Use of commercial lodging increased slightly during 1990, as more than 310 million trips involved a hotel/motel stay. Forty-seven percent of all U.S. resident trips taken in 1990 included use of such accommodations.

As in previous years, hotel patrons traveled most often by auto, 68 percent. The South Atlantic was the most popular destination region for hotel patrons during 1990.

The South Atlantic again dominated as the most popular destination region in 1990, receiving more than 268 million person-trips.

Among the information contained in *The 1990 Travel Market Report* are statistics on auto and air travel, hotel/motel use, travel by various age groups and a breakdown of vacation, pleasure, weekend and business travel in the United States.

The statistics come from the Data Center's National Travel Survey, a monthly telephone survey of 1,500 U.S. adults. The report can be purchased for $165 by contacting the Data Center at (202) 293-1040. *(Data Center members will be receiving a complimentary copy.)*

Cost of Travel Increases Slightly in June

The cost of travel in the United States increased 0.7 percent this past June, after decreasing in April and May. The increase was largely due to a nearly 2 percent jump in lodging prices, according to the Data Center's latest Travel Price Index (TPI).

The TPI, which measures seasonally unadjusted changes in the cost of travel in the U.S. increased to 144.6 (1982 - 84 = 100) during June.

For comparison, the overall cost of goods and services Americans purchase, as measured by the Consumer Price Index (CPI), increased 0.3 percent in June and rose to 135.0.

Travel Price Index and Components

June 1991 TPI Component	Monthly % Change May 1991 to June 1991	Annual % Change June 1990 to June 1991
Transportation	-0.6	5.1
Airline Fares	0.6	3.5
Other Intercity Trans.	0.3	3.9
Intracity Public Trans.	-0.1	3.6
Motor Fuel	-1.5	6.2
Lodging	1.9	17.0
Food and Beverages Away From Home	0.3	3.6
Entertainment	0.6	6.3
TRAVEL PRICE INDEX	0.7	8.0
CONSUMER PRICE INDEX	0.3	4.7

Source: U.S. Travel Data Center and the U.S. Bureau of Labor Statistics

Airline fares increased 0.6 percent in June, this after three consecutive months in which airline fares decreased. In the last 12 months, airline fares increased 3.5 percent.

Overall transportation costs decreased for the first time since April, dropping nearly 1 percent. Even though transportation costs showed a decrease in June, costs increased more than 5 percent in the last 12 months.

Motor fuel showed a decrease in June after increasing 6.1 percent last month. The 1.5 percent decrease in motor fuel was its first decline since March. Over the last 12 months, however, motor fuel costs have increased more than 6 percent.

Entertainment costs increased slightly in June, rising less than 1 percent.

Over the past 12 months, the TPI increased 8 percent, influenced greatly by rising lodging and motor fuel costs. The CPI rose nearly 5 percent over the same 12 month period.

The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

Seventeen Percent of U.S. Population Rented a Car, Survey Says

Seventeen percent of the U.S. adult population, or 32 million people, have used a rental car in the last 12 months, according to the U.S. Travel Data Center's National Travel Survey.

"The rental car industry is a very important segment of the travel industry," said Suzanne Cook, executive director of the U.S. Travel Data Center. "These results from the National Travel Survey illustrate the Data Center's continued commitment to utilize its resources in tracking the entire travel industry."

According to the Data Center's survey, 53 percent of the 32 million rental car users rented a car once in the last 12 months, 21 percent twice, 13 percent between three and five times and 13 percent more than six times. The Data Center's monthly survey interviews a national probability sample of 1,500 U.S. adults.

The 32 million adults using rental cars were most likely to be male, employed in professional/technical occupations, between the ages of 35 to 44 years old, residents of the West region and with family incomes of at least $40,000 a year.

According to a recent *Auto Rental News Study*, the car rental industry has been growing in recent years. There were 1.1 million rental cars in service in 1990, an increase of 21 percent over 1989 and more than double the number in 1980. In addition, 1990 revenues reached $7.5 billion, nearly tripling since 1980, according to the study.

(Continued on Page 3.)

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TRAVEL PRINTOUT reports on Data Center projects, national travel research conducted by other organizations and trends in the U.S. Travel Industry. Subscriptions are $75 per year; Foreign countries, $80 per year, payable in U.S. funds. ISSN: 0744-6233.

The U.S. Travel Data Center sponsors and conducts the National Travel Survey, a monthly, national telephone survey that measures traveler volume and behavior and available for use for custom research by travel suppliers and other companies. For additional information contact Elizabeth Stewert at (202) 293-1040.

1992 TOF Set for October 23 in Washington

Will there be any lasting effects of the recession and Gulf War on the travel industry in 1992? What segments of the industry will prosper in the coming year? How has the industry fared thus far in 1991 and to what extent will it rebound in 1992?

Travel experts from all major segments of the industry will gather to answer these questions and discuss what lies ahead for the travel industry during the U.S. Travel Data Center's 1992 Travel Outlook Forum, October 23, 1991 at the Sheraton Washington Hotel in Washington. The 17th annual Travel Outlook Forum, co-sponsored by the Travel & Tourism Research Association (TTRA), will examine air and auto travel, lodging trends, inbound and outbound international travel, 1991 domestic travel trends and business and leisure travel.

Highlights from the 1992 forum include a select panel of international travel executives from the United States, Canada and Mexico who will discuss the topic of "open skies" and its potential impact on the U.S. travel industry.

In addition, Dr. Barbara Everitt Bryant, director, Bureau of the Census at the U.S. Department of Commerce, will be the featured luncheon speaker at this year's forum.

Visitor Volume at National Parks

Region	MAY 1991 visits	% Change from MAY 1990	Year to Date % Change 1991/90*
NEW ENGLAND	1,495,774	-1.8%	-1.2%
MIDDLE ATLANTIC	3,042,359	19.7	7.5
SOUTH ATLANTIC	8,080,359	-1.2	-2.0
EAST SOUTH CENT.	1,722,890	9.2	3.1
EAST NORTH CENT.	625,337	17.1	8.9
WEST NORTH CENT.	1,030,304	3.1	4.0
WEST SOUTH CENT.	1,055,579	-4.2	-6.0
MOUNTAIN	4,166,875	2.4	-2.5
PACIFIC	4,079,317	2.0	0.5
TOTAL	25,298,794	3.1	-0.3

* Percent change figures may not be consistent with those previously reported due to National Park Service revisions.

Census regions: New England: Conn., Maine, Mass., N.H., R.I., Vermont. Middle Atlantic: N.J., N.Y., Penn. S. Atlantic: Del., District of Columbia, Fla., Ga., Md., N.C., S.C., Va., W.Va. East South Central: Ala., Ky., Miss., Tenn. East North Central: Ill., Ind., Mich., Ohio, Wis. West North Central: Iowa, Kan., Minn., Mo., Neb., N.D., S.D. West South Central: Ark., La., Okla., Texas. Mountain: Ariz., Colo., Idaho, Mont., Nev., N.M., Utah, Wyo. Pacific: Alaska, Calif., Hawaii, Ore., Wash.

This year's Travel Outlook Forum will also include popular speakers from past forums. Suzanne Cook, executive director at the Data Center will review domestic travel trends in 1991; David Swierenga, assistant vice president, Air Transport Association, will discuss air travel and Randell Smith, president of Smith Travel Research, will address accommodations.

Other keynote speakers for this year's forum will include: Mr. Delos Smith, senior business analyst of The Conference Board, who will discuss the 1992 economic outlook; and Watts Wacker, executive vice president at Yankelovich Clancy Shulman, who will focus on consumer trends and leisure travel.

The 1992 Travel Outlook Forum will be held on October 23 followed by the Travel Industry Association's (TIA) National Conference on October 24 at the Sheraton Washington Hotel in Washington.

Registration for the forum only for TIA/Data Center/TTRA members is $195 (up to Sept. 23), $225 (after Sept. 23); non-members is $220 (up to Sept. 23), $250 (after Sept. 23). The entire two-day forum and conference is $350 for members (up to Sept. 23), $420 (after Sept. 23); non-members is $400 (up to Sept. 23), $470 (after Sept. 23).

For additional information or to register for the forum and conference, call (202) 293-1040.

Discoveries...

Despite the common belief that mature adults prefer to spend time with people their own age, a new study released by the National Tour Association reveals that 7 out of 10 individuals are interested in traveling with people of different generations.

"The National Tour Association Study of Mature Adult Lifestyles and Attitudes" is based on a random sample survey of more than 800 people 50 years of age and older in the U.S and Canada.

The study also revealed that 94 percent of the mature adult population in North America is concerned about protecting the environment. Sixty percent would be more likely to take an escorted tour if it were environmentally safe and more than 1 in 3 also said they would be willing to pay an additional charge for such a tour.

The National Tour Association is the primary group travel industry organization in North America and has been a leader in identifying travel trends and attitudes of mature adults. For more information about NTA and this study, call 1-800-755-TOUR.

Current Travel Indicators - 1990/91

	Month	Value	Units	Percent Change Last Month	Year Ago	Year To Date
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging Places(1)	May	$5,599	million	-0.7	2.4	0.2
Eating and Drinking Places(2)	June	$15,584	million	-0.8	2.0	2.5
Gasoline Service Stations(2)	June	$10,724	million	0.5	6.6	7.4
Commercial Lodging Demand						
Hotel/Motel Occupancy Rates(3)	May	62.2	percent	0.3	-4.1	-5.4
Real Demand for Commercial Lodging(4)	Apr	65.7	million	0.3	1.0	-0.6
Airline Passenger Traffic (5)						
Domestic Revenue Passenger-Miles	June	29.3	billion	6.5	0.8	-1.7
Int'l Revenue Passenger-Miles	May	9.6	billion	23.9	0.9	-11.8
	June	11.2	billion	16.7	-0.6	-9.4
Highway Traffic Volume (6)						
Rural Arterial Passenger-Miles	May	47.1	billion	9.1	1.0	-0.8
Rail Passenger Traffic (7)						
Amtrak Passenger-Miles	May	541.8	million	11.9	5.6	2.8
Travel Price Index (1982 - 84 = 100) (8)	June	144.6		0.7	8.0	9.7
Visitor Volume at National Park Service Areas (11)						
Recreation Visits	May	25,298,794		29.4	7.5	-0.3
Overnight Stays	May	1,609,847		66.8	6.6	0.7
Foreign Arrivals to the U.S.						
From Overseas(12)	Nov	N/A				
From Canada(13)	May	1,456,304		-4.8	13.1	7.3
From Mexico(12)	Nov	N/A				
U.S. Citizen Departures						
To Overseas(12)	Dec	1,262,000		18.0	3.6	8.0
To Canada(13)	May	1,055,241		77.8	1.8	-1.4
Domestic Demand for Gasoline						
Barrels/Day(14)	May	7,179	thousands	0.6	-1.7	-1.8

(1) Source: Smith Travel Research, seasonally adjusted. (2) Preliminary; revised monthly. Source: Bureau of the Census. (3) Source: Smith Travel Research, seasonally adjusted. 1986 and 1987 data have been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Preliminary. U.S. scheduled service air carriers. Source: Air Transport Association. (6) Preliminary revised monthly. Source: Federal Highway Administration. (7) Source: National Railroad Passenger Corporation (Amtrak). (8) Source: U.S. Travel Data Center and Bureau of Labor Statistics. (9) Source: U.S. Travel Data Center. (10) U.S. Travel Data Center. Data is not comparable to earlier published numbers due to revised methodology. (11) Preliminary; unadjusted for differences in reporting units. Source: National Park Service. (12) Source: U.S. Travel and Tourism Administration. Mexican data reflect 194 arrivals only. (13) Statistics Canada. (14) Preliminary. Source: U.S. Department of Energy.

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